



# Carrier Setup

## Job Aid

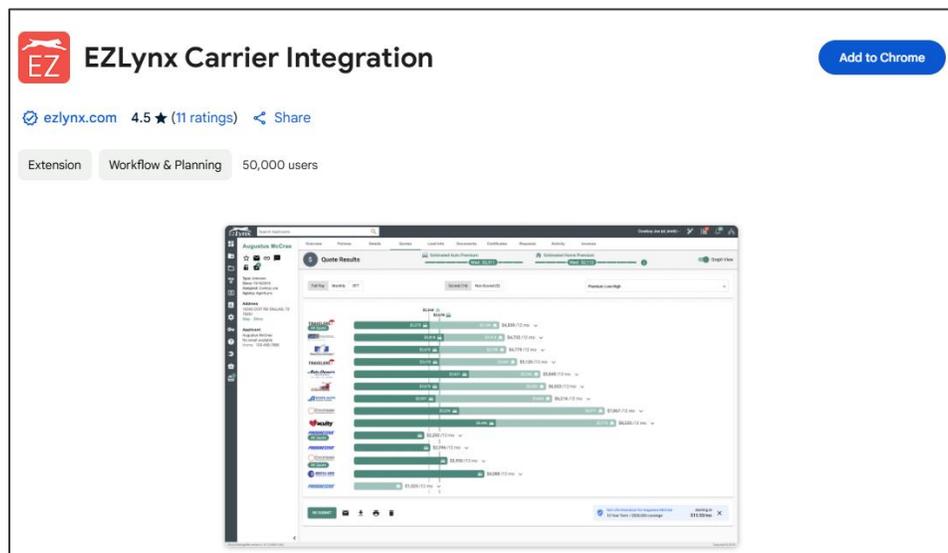
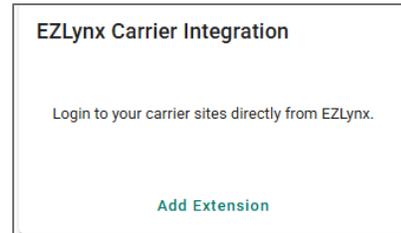
The Clearinghouse Powered by EZLynx

## Start By Adding the Chrome Extension

To bridge your quote from EZLynx to Policy Center, you will need to setup the EZLynx Carrier Integration by adding the Chrome Extension. This can be accomplished in just a few clicks.

To add the extension, follow the following steps:

- Be sure you are accessing EZLynx from a Chrome or Edge browser
- From the **HOMEPAGE**, select the option to **ADD EXTENSION**
- Doing this will launch the Chrome Webstore. In the top right corner, select the option **ADD TO CHROME**. You will need to confirm you want to give the extension access by selecting **ADD EXTENSION** in the popup notification.
- You will then be notified that the extension has been added. After that, you can proceed to adding your carriers.

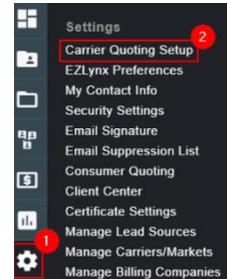


## To Begin Adding Carriers

After you have completed setting up your username and password to access EZLynx, it is now time to get your carriers ready for quoting. Adding carriers is generally handled by agency admins.

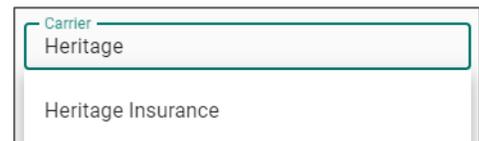
To add new carriers, do the following:

- From the **HOMEPAGE**, navigate to the left-side menu, and select the **GEAR ICON** (1). 
- Once the slide-out menu appears, select **CARRIER QUOTING SETUP** (2).



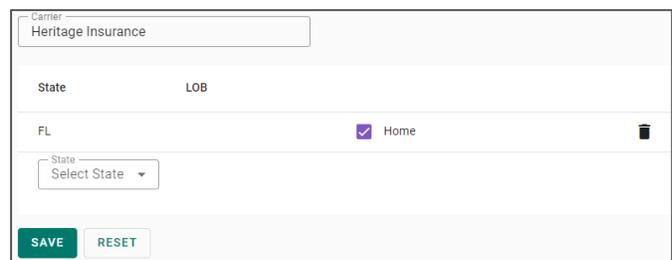
- Once on the **CARRIER QUOTING SETUP** page, select the green **ADD CARRIER** button in the top-right corner. 

- In the **CARRIER SEARCH** field type the name of the carrier you wish to add. In our example shown here, we have typed Heritage, for Heritage Insurance. Select the carrier's name from the dropdown list.



- Select the **STATE** you want to add the carrier for. As Citizens agents, you will select **FL**.

- Select the LOBs you wish to use this carrier to rate with (**HOME** and/or **DWELLING FIRE**). Please note that if you are not seeing a LOB, it is likely that the carrier has not integrated that LOB with EZLynx.



- Once you have selected the State and LOBs, click on the green **SAVE** button. There will be a quick **SAVE NOTIFICATION** that will appear at the bottom of the screen. 

- Choose **GO BACK** to exit and then repeat the exercise until all of your FL appointed carriers have been added. 

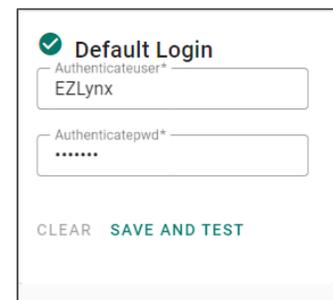
## Setting Up Carrier Logins

Once you have added all of your appointed carriers in EZLynx, it is now time to setup your individual carrier logins. This is generally done by each of the agents, individually, but can be handled by the admin provided your agency has shared carrier logins.

To setup your carrier logins, do the following:

- On the carrier card, select the **VIEW DETAILS** option in the bottom-left corner of the card. 
- Select the second tab at the top titled **LOGINS**.
- Add your **USERNAME** and **PASSWORD** for the carrier.

- Once you have entered your username and password, select **SAVE AND TEST**. EZLynx will then connect to the carrier site and confirm your credentials. Provided your credentials are correct, you will receive a confirmation message and there will be a green check mark next to the words **DEFAULT LOGIN**.



- You may also choose to add default answers to some of the carrier specific questions. This can be done from the **CARRIER QUESTIONS** tab. Here, you may choose to add your producer or agency code. Doing it here will allow it to prefill in the rating application and save you time.
- Choose **GO BACK** to exit and then repeat the exercise until all of your FL appointed carrier logins have been added. 

- If you are ever wondering if your logins are set, you can easily check by looking at the top-right corner of the carrier card. If they are not set, you will see a **RED WARNING ICON**. If they are set, then you will see a **GREEN CHECK ICON**.

